

Cloud9



Case Study: Direct Commercial

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INSPIRATIONAL
CLARITY

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About Direct Commercial

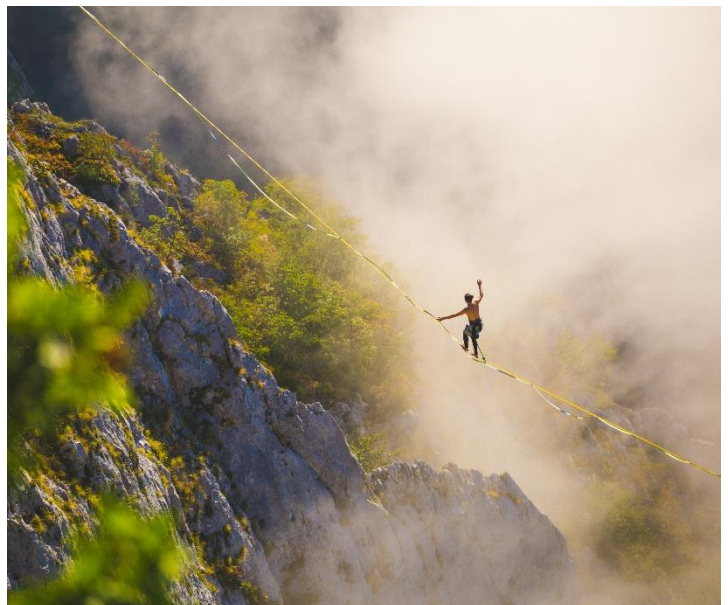
Direct Commercial (DCL) is a UK-based insurance underwriter specialising in vehicle fleet management. They work with insurance brokers, who sell policies to businesses operating fleets of vehicles, and these brokers become DCL 'Agencies' that act as the face of the business to the end client.

Broker relationship management was being handled entirely via spreadsheets. This led to operational inefficiencies across two core business functions at DCL.

The Challenge

The Business Development Management Team, who travel the UK identifying insurance brokers who could become new agencies, had no unified tool to manage these interactions. Activities were spread across emails and spreadsheets, kept in disconnected tools like Outlook and SharePoint

The Agency Team, who perform due diligence checks and onboarding for new brokers, lacked a centralised system to manage the life cycle of brokers to Agencies.



DCL needed a way to:

- Track the broker onboarding process from application to approval
- Equip the Business Development Management Team with tools to manage visits and broker engagement
- Provide real time insights and reduce time spent compiling reports

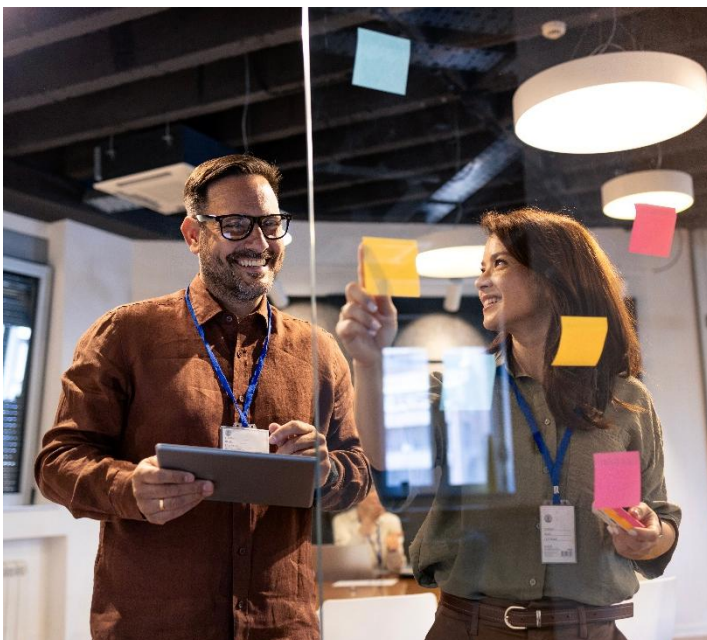


The Solution

Cloud9 designed and built a custom Power Apps based solution tailored to how DCL works. The key features of this application are:

- Agency Application Management – New potential Agencies begin as an 'Agency Application' record. This functions similarly to a lead, capturing key company and contact details. Based on outcome, automations either convert the record to an active Agency or pause it for nurture marketing.
- Custom Workflows and Business Rules – Automations and validations streamline the application process and reduce the errors made in manual data entry.
- Visit Tracking – Once an Agency is live, interactions are logged via customisations to appointment records. These appear in reports to support management visibility and activity tracking.
- Power Platform Compatibility – The system leverages standard Microsoft integration with Outlook, Teams, and SharePoint. Users can manually sync data between platforms where required.

The Outcome



The implementation of the custom Power Apps solution has transformed DCL's agency management process, delivering a streamlined, integrated, and scalable system.

The new application enables DCL to efficiently manage incoming agency applications through an automated workflow, ensuring that data is captured accurately and processed consistently. Automations and business rules have significantly reduced manual errors and administrative workload.

Through native integration with Microsoft Outlook, Teams, and SharePoint, the solution ensures seamless communication and data sharing across platforms, driving collaboration and operational efficiency.



Hear it From Direct Commercial

"We recently partnered with Cloud9 to implement Dynamics 365 for Sales across our organisation, and the experience has been a very positive one.

We were looking for a partner who not only had a strong understanding of Dynamics 365, but also brought industry know-how, a solid track record, and a genuine commitment to customer service. Cloud9 delivered on all fronts.

They quickly earned our trust and confidence, showing that they not only understood our needs, but were also invested in helping us achieve the right outcomes. The team worked closely with us throughout the project, designing and implementing a tailored solution that truly fits the way we work.

We felt supported every step of the way. From the initial planning stages right through to after 'go live', the Cloud9 team have been reliable, responsive, and ready to help. It's been a reassuring and collaborative experience, and we're grateful for their continued support as we settle into our new system."





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